



ERNEST ORLANDO LAWRENCE  
BERKELEY NATIONAL LABORATORY



INFORMATION TECHNOLOGY  
DIVISION

# **BLI: eRoom Advanced**

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**Information Technology Division**

## **Agenda**



- **Overview of eRoom**
- **Managing data**
  - **Exercise #1** access rights, version control, inbox
- (Break)
- **Data base**
  - **Exercise #2** canned database
  - **Exercise #3** freeform database
- (Break)
- **Project Plan**
  - **Exercise #4** project creation
- **Questions**



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## Overview of eRoom



- **Primary functions**
  - **Document management**
    - ~ **Access control**
    - ~ **Version control**
    - ~ **Email into system**
  - **Project management**
    - ~ **Gantt charts**
    - ~ **Status reports**
  - **Data bases**
    - ~ **Configured**
    - ~ **Free form**



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## Overview of eRoom



- **Features**
  - **Web based client accessible anywhere in the world**
  - **Ability to have internal and external members**
  - **Search**
    - ~ **In an eRoom or system wide**
    - ~ **Inside documents**
  - **Email notifications**
  - **Email inboxes**
    - ~ **Allowed from non-members**



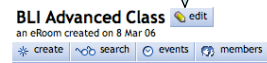
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## Overview of eRoom



- **eRoom settings**
  - **For coordinators only by default**



- **Options available**
  - **Status**
  - **Name**
  - **Options**
  - **Invitation**
  - **Welcome message**
  - **Usage reports**



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## Managing Data



- **Access rights**
- **Version control**
- **Adding people to an eRoom**
- **Searching**
- **Email inboxes**

**(Exercise #1) access rights, version control, inbox**



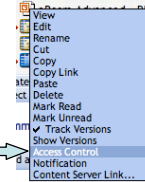
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## Access Rights



- Right click any data type icon to display options
  - Select access control



- Select persons who need to be able to read and/or edit the item.

Access Control governs who can open this file and who can edit it. people.

The people with rights to this file are:

Open: Any member who can get to it  
Edit: CJMcDonald

This file is:

☐ Read-only (not editable)  
☐ Hidden (only shown to members who can open it)  
☒ Reserved for editing

This item was reserved by CJMcDonald on 16 Mar 06 at 9:53am.

- If a file is checked out, it will be listed here



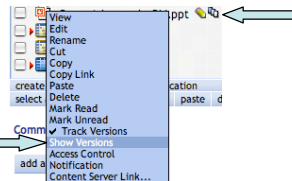
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## Version Control



- Right click document icon and select show versions or click show versions icon



### Current Version

eRoom Advanced - BLI.ppt  
CJMcDonald, 15 Mar 06 4:04pm, 2038 k

### Version History

Name	Author	Created	Version
March 15th addition	CJMcDonald	15 Mar 06 4:04pm	2
eRoom Advanced - BLI	CJMcDonald	10 Mar 06 2:05pm	1

select all copy copy link delete mark read mark unread

Version Notes turn off version tracking take a vote add a version note

Notes for version 2 (CJMcDonald, 15 Mar 06 4:04pm)  
Additions based upon comments from MLR



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## Version Control



- **Editing versus viewing**
  - **Clicking a document will open it in view mode**
    - ~ **If changes are made to the document, eRoom will prompt you to save the changes (with plugin only)**
  - **Editing a document will reserve (lock) the file**
    - ~ **Reservation is removed when changes are saved back to eRoom**
    - ~ **If anyone else tries to edit they are notified the file is being edited**



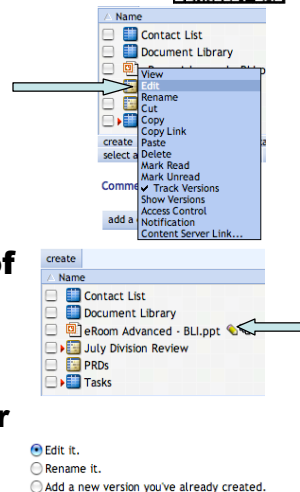
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## Version Control



- **To edit a file and reserve it**
  - **Right click icon for file and select edit**
- **Select pencil icon to right of file name (detailed viewing mode)**
- **Prompted to edit, rename or add a new version already created**



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## Version Control



- **After editing is completed**
  - **File is automatically saved back to eRoom (with plugin)**
  - **Must choose to upload new version (without plugin)**
  - **Both prompt for additional version details**

### Add Version Note

You can choose a descriptive name for this version of your file, and a

Version Description

Version Notes



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## Adding people to an eRoom



### Internal people in LDAP

- **Click the members button from the root of your eRoom**
  - **Only available to coordinators**
- **Click add**
- **Click first letter of last name and scroll to find the person**
  - **Or...**

### BLI Advanced Class

an eRoom created on 8 Mar 06

create search events members

### Members of the BLI Advanced Class eRoom

add	remove	invite	add a role	change roles	hide via-group members
Groups & Roles					
name					
There are no groups.					
Members					
name					
Admin, eRoom (site administrator)					
McDonald, Curtis (community administrator)					
Test, Curtis					

Pick the members you want to add to the BLI Advanced Class eRoom.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
name																									
organization																									
Abbott, Eric																									
Abbott, Kim																									



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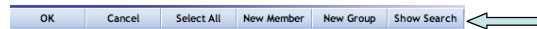
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## Adding people to an eRoom



### Internal people in LDAP (continued)

- Click show search button



Choose Members from the LBNL Community

- Enter beginning of first or last name and click find to display

Search for:

☒ People

Display name:

First name:

Last name:

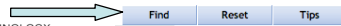
Organization:

Email:

☐ Group



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## Adding people to an eRoom



### Internal people in LDAP (continued)

- Click check box next to their name

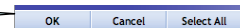
Pick the members you want to add

A	B	C	D	E	F	G	H	I	J
name									
<input type="checkbox"/>	McDermott, Gerry								
<input checked="" type="checkbox"/>	McDonald, Curtis J								
<input type="checkbox"/>	McDonald, Joseph								
<input type="checkbox"/>	McDonnell, Andrew								
<input type="checkbox"/>	McDonnell, Erin								

Selected Members:  
There are no members selected.

- Continue searching and selecting members until complete

- Click ok



- Select the role to apply to the new members

Choose Role

Assign these members to a new role.

- ☐ Coordinators (controls membership and roles)
- ☒ Participants (working member)
- ☐ Observers (can read, but not contribute)

- Coordinator
- Participant
- Observers



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## Adding people to an eRoom



### External people

- **Try searching for their name**
  - They may already have an account
- **To request a new external account send the following information to [eroom@lbl.gov](mailto:eroom@lbl.gov)**
  - **Person's name (first and last)**
  - **Person's email address**
  - **Company/organization they work for**
  - **Account number to be used for monthly recharges**



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## Searching



- **eRoom can search for data in all data types**
  - **Word, excel, powerpoint, autocad, etc**
  - **Database, project plan, email inbox, etc**
- **eRoom indexes (searches for new information) every 5 minutes**
- **Two types of searches**
  - **Within an eRoom**
  - **Within all eRooms you have access to**



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## Searching



- Within all eRooms which I have access to
- From main eRoom page 'My eRooms' select search the site button

My eRooms

My eRooms

search the site

Search All eRooms

- Search for any text
- Select date range
- Click search

Search for:

Text:

Date:  any

Search for: ☒ Items ☐ eRooms

☐ Search all eRooms I administer

Search Tips



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## Searching



1. Click document name to open document
2. Click folder name to open folder containing document
3. Click eRoom name to open eRoom

Rank	Name	Modified	Owner	Found	eRoom
1	b14473.pdf	12 Oct 05 9:49am	CJMcDonald	10g Upgrade	**WCS
2	b14472.pdf	12 Oct 05 9:49am	CJMcDonald	10g Upgrade	**WCS



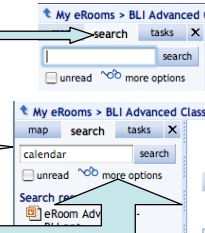
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## Searching



- In an eRoom click the search tab
- Search for any text
- Click more options to display details and additional options



Search for:

Text:

Date:

Owner:

☐ Unread Items Only

Rank	Name	Modified	Owner	Found In
1	eRoom Advanced - BLI.ppt	15 Mar 06 4:04pm	CJMcDonald	Curtis

access notification  
select all cut copy copy link delete mark read mark unread



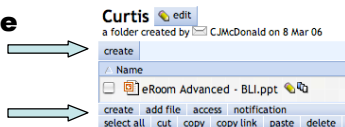
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## Email Inboxes



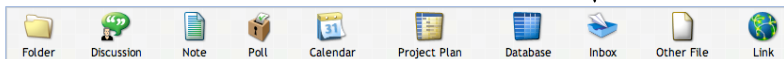
- Choose create



- Select inbox

Create

What type of item would you like to create?



Create Inbox

Choose a name and email address for this inbox, and add a description if you want one.

- Select a name
- Select the address

Name:

Address:  @erom2.lbl.gov



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## Exercise #1



**Login to eRoom and open the BLI Advanced Class eRoom**

### **1. Access rights**

1. **Create a folder called 'your name' in the root of the BLI Advanced eRoom**
2. **Create a word document and add it to your folder**
3. **Working with a partner:**
  1. **Try to edit your partner's document**
  2. **What happens?**
  3. **Give your partner access rights to edit your document**
  4. **Try to edit the document again and save your changes back to eRoom**
  5. **What happens?**



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## Exercise #1



### **1. Access rights (continued)**

1. **Change the access rights for your folder to have all new documents initially owned by everyone who can open the folder**
2. **Create a powerpoint presentation file and add it to your folder**
3. **Working with a partner:**
  1. **Try to edit your partner's presentation and save the changes back to eRoom**
  2. **What happens?**
  3. **Look at the details for both your files to see the owner**
  4. **Are the owners different?**



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## Exercise #1



### 2. Version control

1. **Edit your word document and power point presentation, save changes back to eRoom**
2. **Edit your partner's word document and save changes back to eRoom**
3. **Look at the versions for your documents**
  1. **Notice the time, date and modifier of each version**
  2. **Select an older version to edit, replacing the newest one**
    1. **Make changes and save back to eRoom**
    2. **Look at the version number**
    3. **What is different about this version?**



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## Exercise #1



### 3. Email inbox

1. **In your folder, create a new email inbox called BLI-(name) e.g. [BLI-John@erom2.lbl.gov](mailto:BLI-John@erom2.lbl.gov)**
2. **Create a new word document**
3. **Login to your LBNL email account via <http://www.lbl.gov/mail>**
4. **Create a new email message addressed to your inbox with the document you just created attached.**
5. **Wait a few minutes**
6. **Open your eRoom inbox and open the message**
7. **Copy the attachment from the email message to your folder**
8. **Edit the document**



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## Break



- **Any questions?**



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## Data bases



- **Canned data base overview**  
**Exercise #2**
- **Freeform data base overview**  
**Exercise #3**
- **Data base import/export overview**
- **Enterprise database overview**



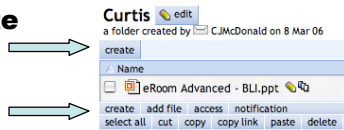
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## Canned database



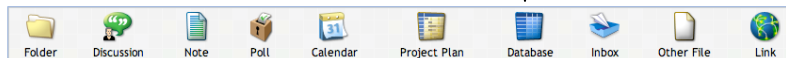
- **Choose create**



- **Select database**

Create

What type of item would you like to create?



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## Canned database (2)



- **The following options are shown**

### Database Type

What kind of database do you want to create?

- ☐ Ask the Expert
- ☐ Contact List
- ☐ Document Library
- ☐ Issues (approval process)
- ☐ Issues Tracking (enterprise)
- ☐ Milestones
- ☐ Research Resources
- ☐ RFP Process (approval process)
- ☐ T&E Processing (approval process)
- ☐ Tasks
- ☐ URL Links
- ☒ (blank)

☐ create an enterprise overview (enterprise databases only)



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## Document Library Database



- **Select a name**
- **Choose a color scheme**
- **Click next**

### Set Database Name

Pick a name for this database.

Document Library

☐ This database is a multi-step approval process.

Pick a color scheme for this database

☐ City Zip ☒ City Zip ☐ City Zip ☐ City Zip  
Cambridge 02138 Cambridge 02138 Cambridge 02138 Cambridge 02138

☐ Go through all database options now.

[access control](#) [change icon](#) [custom commands](#)

- **Document library database is created**



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## Contact List Database



- **Select a name**
- **Choose a color scheme**
- **Click next**

[Next](#) [Previous](#) [Cancel](#)

### Set Database Name

Pick a name for this database.

Contact List

☐ This database is a multi-step approval process.

Pick a color scheme for this database

☐ City Zip ☒ City Zip ☐ City Zip ☐ City Zip  
Cambridge 02138 Cambridge 02138 Cambridge 02138 Cambridge 02138

☐ Go through all database options now.

[access control](#) [change icon](#) [custom commands](#)

- **Data base is created**



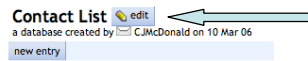
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## Contact List Database (Modify)



- Open the database
- Select edit button



- The following options are available

- Select add a field

OK Cancel

**Edit Database**

What would you like to do with this database?

☒ Add a field

☐ Delete fields

☐ Rearrange fields

☐ Change a field

☐ Change the database name and other basic settings

☐ Change the summary-page options

☐ Change the welcome message and instructions

☐ Go through all the database options

[For more information, see Editing a database.](#)



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## Contact List Database (Modify)



- Choose the field order
- This new field should appear after the cell field
- Click next

Next Cancel

**Field Order**

Pick the existing field you want this field to appear after.

☐ (before the first field)

☐ Name

☐ Email

☐ Role

☐ Responsibility

☐ Organization

☐ Phone

☒ Cell

Next Previous Cancel

- Enter field name: pager
- Select the field data type
- Click next

**Create Field**

Pick a name for this field.

Pager

Pick the field's data type.

Number



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## Contact List Database (Modify)



- **Select additional field options, if applicable**
- **Two major items**
  - **Show on summary page**
  - **Show in search form**



OK Previous Cancel

### Database Field Options

Each field has different additional options, depending on its data type. pick the approvers. Otherwise, these settings are all optional.

Look over the options for each field, and make any changes you want.

Pager Number

Initial value

☐ Display on the same line as the previous field

☐ Use this field as the title of entries

☒ Show this field on the summary page

☐ Show this field in the search form

☐ Use this field as the default grouping

☐ Use this field as a grouping option

OK Previous Cancel



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## Contact List Database (Modify)



- **Open the database**
  - **Select edit button**
- Contact List    
a database created by C.J.McDonald on 10 Mar 06
- 
- **The following options are available**
  - **Select go through all database options**



OK Cancel

### Edit Database

What would you like to do with this database?

☐ Add a field

☐ Delete fields

☐ Rearrange fields

☐ Change a field

☐ Change the database name and other basic settings

☐ Change the summary-page options

☐ Change the welcome message and instructions

☒ Go through all the database options



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## Contact List Database (Modify)



- The name and color scheme can be changed here

- Select access control button

Next Cancel

**Set Database Name**

Pick a name for this database.

☐ This database is a multi-step approval process.

Pick a color scheme for this database

City	Zip
Cambridge	02138

access control change icon custom commands



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## Contact List Database (Modify)



- Select who can open and edit the database

- Select if it should be Read-only or hidden

- Select the initial owner of records in the database

- Select OK and next

OK Cancel

**Access Control**

Access Control governs who can open this item and who can edit it. List of people.

The people with rights to this item are:

Open

Edit

This item is:

☐ Read-only (not editable)

☐ Hidden (only shown to members who can open it)

☐ Reserved for editing

An entry created in this database can be edited by:

☐ The member who created it

☐ The member who created it and the database owners

☒ Everyone who can open the database



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## Contact List Database (Modify)



- Option to add a field shown at top of page
- Click pencil to change name
- Blue arrows to change order
- Red X to delete
- The field can limit the number of characters
- An initial value can be added

Next Previous Add Another Cancel

### Database Field Options

Each field has different additional options, depending on its data type. fields, you must enter the choices or pick the approvers. Otherwise, t  
Look over the options for each field, and make any changes you want.

Name Plain text

☐ Limit this field to 40 (1-256) characters

Initial value

☐ No word-wrapping



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## Contact List Database (Modify)



- Entry title
  - The name used by eRoom for the entry
- Summary columns
  - Shown in summary view
- Search form
  - Ability to use search tool on this field
- Grouping default
- Grouping options
- Option to have attachments, comments and votes

### Database Summary Options

Pick the fields to use for each summary-page function. For notes, see below.

field	entry title	summary columns	search form	grouping default	grouping options
all fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
no fields	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cell	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a blank for searching all text fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- ☐ Include space for comments and votes
- ☐ Include box for attachments



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## Contact List Database (Modify)



- The welcome message will appear in the summary screen

### Database Instructions

You can provide a welcome message for the top of the database summary page. If you do

Trebuchet MS 10 B I U A

Maintain the contact information for all the current members of the project team.

- The special instructions will appear when creating a new entry

You can also provide any special instructions users will need for adding and editing entries

Trebuchet MS 10 B I U A

Please keep your contact information updated.



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## Exercise #2 Database



### In the 'BLI Advanced Class' eRoom

1. Create a folder named with your first name
2. Inside the folder create a 'Document Library' database
  1. Name it 'Document Library'
3. Edit the database you just created
  1. Delete the status field
  2. Add an owner field
    1. Name it owner
    2. After the title field
    3. Data type of member list
  3. Allow for searching of title field
4. Add a new record
5. Create a document and add it to the new record



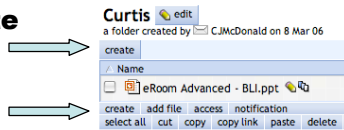
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# Freeform Database



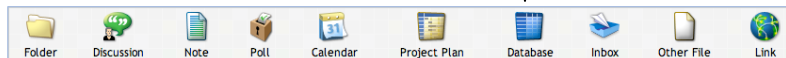
- **Choose create**



- **Select database**

Create

What type of item would you like to create?



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# Freeform Database



- **Select blank (default option)**

## Database Type

What kind of database do you want to create?

- ☐ Ask the Expert
- ☐ Contact List
- ☐ Document Library
- ☐ Issues (approval process)
- ☐ Issues Tracking (enterprise)
- ☐ Milestones
- ☐ Research Resources
- ☐ RFP Process (approval process)
- ☐ T&E Processing (approval process)
- ☐ Tasks
- ☐ URL Links
- ☒ (blank)

☐ create an enterprise overview enterprise databases only)



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# Freeform Database



- Name the database
- Enter names of fields needed in database

Next Previous Cancel

## Database Fields

The structure of a database is defined by its fields. In a phone-book database: State, Zip, Home Phone, Work Phone, Cell Phone, Fax Number and Email Address. Type the names of the fields you would like in this database, one per line.

Name  
Notes  
Tasks Type  
Priority  
Date Added  
Due Date  
Owner  
Attachments

Next Previous Cancel

- Assign a data type to each field

## Database Field Types

Choose a data type for each field.

Name Plain text  
Notes Plain text  
Tasks Type Choice list  
Priority Number  
Date Added Date  
Due Date Date  
Owner Member list  
Attachments Attachment box



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# Freeform Database



- Database field options allows for further refinements
- Limiting the size of fields
- Specifying items in a choice list
- Allowing multiple choices

Notes Plain text

☐ Limit this field to 40 (1-256) characters

Initial value

☐ No word-wrapping

☐ Display on the same line as the previous field

Tasks Type Choice list

Type the choices for this list, one per line

Administrative  
Financial  
Planning

☐ Allow multiple choices

Initial value

☐ No word-wrapping

☐ Display on the same line as the previous field



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## Freeform Database



- For date fields, select if a due date
- Can set the initial value
- For member list fields can limit list
- Can allow multiple choices

Date Added Date

☐ This is a due date

Initial value

☐ Blank

☒ Date created

☐ Date created plus  days

☐ Display on the same line as the previous field

Due Date Date

☒ This is a due date

Initial value

☐ Blank

☒ Date created

☐ Date created plus  days

☐ Display on the same line as the previous field

Owner Member list

Which members should be listed?

☒ All members of the eRoom

☐ Only these members:

☒ Allow multiple choices

☐ Display initials, not full names

☒ This is an owner field

Initial value



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## Freeform Database



- Select search options
- Add any appropriate database instructions

### Database Summary Options

Pick the fields to use for each summary-page function. For more, see below.

field	entry title	summary columns	search form	grouping default	grouping options
all fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
no fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tasks Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Priority	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date Added	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Due Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a blank for searching all text fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Database Instructions

You can provide a welcome message for the top of the database summary page.

You can also provide any special instructions users will need for additional fields. Leave this box blank.



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## Exercise #3 Freeform Database



In the 'BLI Advanced Class' eRoom

- Inside your folder create a blank database (named tasks) using the following information:

Fields	Data Type	Additional info.
Name	Plain text	n/a
Priority	Choice list	high, medium & low
Due date	Date	this is a due date
Date added	Date	date created
Owner	Member list	allow multiple choices
Attachments	Attachment box	n/a



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## Exercise #3 Freeform Database



- Add a minimum of three new records to your tasks database
  - Select a combination of high, medium and low priorities
  - Select different owners and multiple owners
    - ~ Make yourself the owner of at least one entry
  - Select different due dates for each item



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## Database: import/export



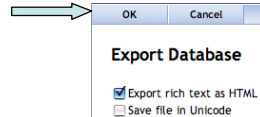
- When adding a large amount of data to a database, it will likely be easier to import it from excel
- Begin with an export of existing data

Tasks edit  
a database created by C.J.McDonald on 14 Mar 06

new entry					
	Name	Priority	Due date	Date added	Owner
	project planning	medium	4 Apr 2006	14 Mar 2006	C.J.McDonald
	financial planning	high	31 Mar 2006	14 Mar 2006	eRoom Admin
	quarterly review	high	30 Mar 2006	14 Mar 2006	Curtis Test

new entry notification export import  
select all cut copy copy link paste delete mark read mark unread

- Select ok with default settings



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## Database: import/export



- Right click on file link and choose to download file

**IE**

**Mozilla**

**Safari**

Export Complete

Click the link below to download the export file.

Tasks Tasks

Open Link in New Window  
Open Link in New Tab  
Bookmark This Link...  
Save Link As...  
Send Link...  
Copy Link Location  
Properties

Export Complete

Click the link below to download the export file.

Tasks Tasks

Open Link in New Window  
Open Link in New Tab  
Download Linked File  
Add Link to Bookmarks...  
Copy Link



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## Database: import/export



- **Open exported file with excel**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_IsDue	Date added	Owner
2	project planning	medium	4/4/06		3/14/06	CJMcDonald
3	financial planning	high	3/31/06		3/14/06	eRoom Admin
4	quarterly review	high	3/30/06		3/14/06	Curtis Test

- **Create additional entries using existing data format as a guide**
  - **e.g. use 4/4/06 as a date**
    - ~ **Not 04/04/06**
    - ~ **Not March 4, 2006**
  - **e.g. use CJMcDonald as owner**
    - ~ **Not Curtis**
    - ~ **Not McDonald**
    - ~ **Outside people will be listed as name**
      - **E.g. 'John Doe'**



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## Database: import/export



- **Add new data to file using copy and paste if possible**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_IsDue	Date added	Owner
2	project planning	medium	4/4/06		3/14/06	CJMcDonald
3	financial planning	high	3/31/06		3/14/06	eRoom Admin
4	quarterly review	high	3/30/06		3/14/06	Curtis Test
5						
6	create class	medium	3/19/06		3/18/06	CJMcDonald
7	copy materials	medium	3/20/06		3/18/06	CJMcDonald
8	setup classroom	medium	3/21/06		3/18/06	Curtis Test

- **When finished, remove existing records.**
- **Leave field names in file, row 1**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_IsDue	Date added	Owner
2	create class	medium	3/19/06		3/18/06	CJMcDonald
3	copy materials	medium	3/20/06		3/18/06	CJMcDonald
4	setup classroom	medium	3/21/06		3/18/06	Curtis Test

- **Save file, leaving in csv format**



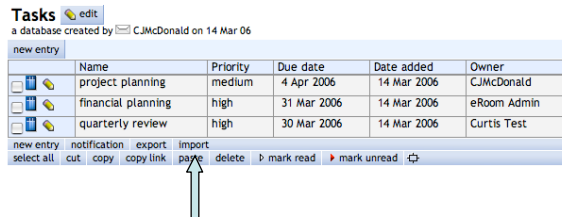
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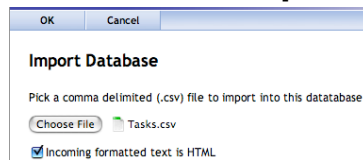
## Database: import/export



- **Return to database and select import**



- **Choose the file to import and select ok**



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## Database: import/export



- **Review prompt for data being uploaded.**
- **Select ok**



### Import Tasks.csv

3 rows of data will be imported into 6 fields (Name, Priority, Due date, Due date\_IsDue, Date added, Owner). If that doesn't sound right, click Cancel and check your import file.

The easiest way to figure out the proper data format for your import file is to export some of your existing data, and look at the format of the export file.

- **Data will import and be displayed**

new entry					
	Name	Priority	Due date	Date added	Owner
	project planning	medium	4 Apr 2006	14 Mar 2006	C.J.McDonald
	financial planning	high	31 Mar 2006	14 Mar 2006	eRoom Admin
	quarterly review	high	30 Mar 2006	14 Mar 2006	Curtis Test
	create class	medium	19 Mar 2006	18 Mar 2006	C.J.McDonald
	copy materials	medium	20 Mar 2006	18 Mar 2006	C.J.McDonald
	setup classroom	medium	21 Mar 2006	18 Mar 2006	Curtis Test

new entry notification export import  
select all cut copy copy link paste delete mark read mark unread



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## Enterprise Database



- **Enterprise data bases can pull information from many data bases into an enterprise overview**
- **Useful for rolling up reports to managers**
- **CIS (now ITUS) has used this function to create a standard for all projects**
- **CIS management can review the status of all projects by viewing the one enterprise view instead of viewing each project eRoom separately**



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## Break



- **Any questions?**



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# Project Plan



- **Plan**
  - **Create new**
  - **Categories**
  - **Predecessors**
  - **Export/import**
  - **Exercise #4**
- **Working with plan**
  - **Modifying schedules**
  - **Status reports**



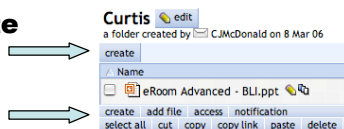
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# Project Plan Creation



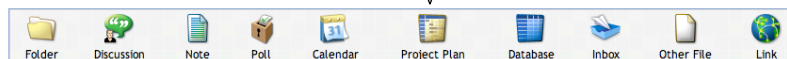
- **Choose create**



- **Select project plan**

Create

What type of item would you like to create?



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# Project Plan Creation



- **Pick a project name**

## Create Project Plan

Pick a name for this project plan.

July Division Review

- **Start date**

Start date 4/1/2006

Weeks begin on Monday

- **Additional description**

Description

Processes to prepare for the July 2006 Division Review

- **Attachments, votes, etc. in overview**

- ☐ Include space for comments and votes
- ☒ Include box for attachments
- ☐ Keep change logs

Progress reports

Enable progress reports if you want to follow the status of tasks: ahead ☐, on time ☐, tardy ☐, or late ☐. (Access Control, below, determines who may file the reports.) Disable progress reports if you merely want to mark tasks "done" when complete.

- **Progress reporting capability**

- ☐ Disable progress reports
- ☒ Enable progress reports

A report is due for an active task every 7 days

A task changes from tardy ☐ to late ☐ when it falls behind schedule by 15 % or more



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# Project Plan Creation



- **Working days**

- **Can choose to include or remove days from work week.**

Working days and holidays

Every project plan follows working days and holidays. Choose which days to use for this project plan. (Caution: changing the days may reschedule existing tasks.)

- ☒ Use the default days
- ☐ Use custom days unique to "July Division Review"

Default working days

Monday  
Tuesday  
Wednesday  
Thursday  
Friday

- **Categories allow you to sort tasks.**

Default holidays

Date Description  
There are no default holidays.

Categories

A category can be assigned to a task like a keyword, permitting you to group tasks arbitrarily.

Categories

Name (delete)  
There are no categories.

- **Use when there are many tasks**

- **Click add a category**

add a category



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## Project Plan Creation



- Enter the category name and choose to add another
  - Continue adding category names until complete
  - Click the OK button to enter last category

OK Add Another Cancel

July Division Review  
Create Category

Name

- The categories will all be listed on the project plan creation page

Categories  
A category can be assigned to a task like a keyword,

Name	(delete)
Administrative	
Financial	
Meeting planning	

- Click access control button

access control change icon custom commands



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## Project Plan Creation



- Select persons for viewing and edit right to the project plan framework

### July Division Review Access Control

Access Control governs who can open this item and who can edit it. You can list of people.

The people with rights to this item are:

Open

Edit

- Choose to make hidden if needed

This item is:

☐ Read-only (not editable)

☐ Hidden (only shown to members who can open it)

☐ Reserved for editing

- Select who can edit tasks in this project plan

A task created in this project plan can be edited by:

☐ The member who created it

☐ The member who created it and the project plan owners

☒ Everyone who can open the project plan

- Select if a person can file progress reports for their tasks

☒ A member who is assigned as a task resource may file progress reports

- Select ok to complete access rights



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# Project Plan Creation



- Click ok on previous window to complete the project plan creation
- You will now see an empty project plan

**July Division Review** [edit](#)  
a project plan created by C.J.McDonald on 14 Mar 06

new task  ungrouped in weeks < back > next start chart on 4/1/2006  go today

Processes to prepare for the July 2006 Division Review

Task	ID	Dur.	Δ	Gantt
All tasks 0	0d			3 Apr 06 10 Apr 06 17 Apr 06 24 Apr 06

Click "new task" to create a task.

new task notification export import  
select all cut copy copy link paste delete mark read mark unread

**Attachments**

create add file mark read commands



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# Project Plan Creation



- Click the new task button
  - Title the task Title Collect financial data from this quarter
  - ID is sequentially created ID (set automatically)
  - Predecessors if any apply
  - Duration in days, not hours Duration 1 days (enter 0 for a milestone)
  - List earliest start date, if applicable Earliest start 6/21/2006
  - Click recalculate to populate the start and finish fields  click to see new start and finish
- Progress Progress reports can be filed for this task after you finish creating it.  
☐ Omit duration, progress, and status from summaries
- Start 21 Jun 06  
Finish 21 Jun 06



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## Project Plan Creation



- **Select a category** → Category
- **Select resources** → Resource
- **Add notes** → Notes
- **Provide a further description** → Description
- **Choose to allow comments, votes and attachments** → ☐ Include space for comments and votes  
☒ Include box for attachments
- **Select add another or ok when finished adding tasks** →



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## Exercise #4 Project Plan



**Inside your folder create a new project plan using the following information:**

1. **Name: PRD Process**
2. **Use all defaults unless noted below**
3. **Start date: tomorrow**
4. **Include attachments**
5. **Keep a change log**
6. **Create categories**
  1. **Preparation**
  2. **Training**
  3. **Supervisor Form Completion**
  4. **Review**



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## Exercise #4 Project Plan



### Add the following tasks:

<b>Title</b>	<b>Create PRD form</b>
<b>Predecessors</b>	n/a
<b>Duration</b>	3
<b>Earliest start</b>	April 1, 2006
<b>Category</b>	Preparation
<b>Resource</b>	you

<b>Title</b>	<b>Insert PRD forms into eRoom</b>
<b>Predecessors</b>	'Create PRD form'
<b>Duration</b>	10
<b>Earliest start</b>	n/a
<b>Category</b>	Preparation
<b>Resource</b>	you



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## Exercise #4 Project Plan



### Add the following tasks:

<b>Title</b>	<b>Create training plan</b>
<b>Predecessors</b>	n/a
<b>Duration</b>	8
<b>Earliest start</b>	May 1, 2006
<b>Category</b>	Training
<b>Resource</b>	you & Curtis Test

<b>Title</b>	<b>Train staff</b>
<b>Predecessors</b>	'Create training plan'
<b>Duration</b>	5
<b>Earliest start</b>	n/a
<b>Category</b>	Training
<b>Resource</b>	Curtis Test



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## Exercise #4 Project Plan



### Add the following tasks:

<b>Title</b>	<b>Create PRDs for employees</b>
<b>Predecessors</b>	<b>'Insert PRD forms into eRoom' &amp; 'Train staff'</b>
<b>Duration</b>	<b>20</b>
<b>Earliest start</b>	<b>n/a</b>
<b>Category</b>	<b>Supervisor Form Completion</b>
<b>Resource</b>	<b>Everyone</b>



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## Exercise #4 Project Plan



### Add the following tasks:

<b>Title</b>	<b>Supervisor review of PRDs</b>
<b>Predecessors</b>	<b>'Create PRDs for employees'</b>
<b>Duration</b>	<b>10</b>
<b>Earliest start</b>	<b>n/a</b>
<b>Category</b>	<b>Review</b>
<b>Resource</b>	<b>pick two people</b>



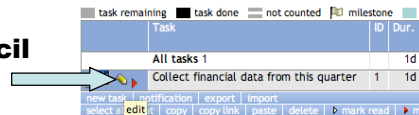
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## Project Plan Management



- After a plan has been created you may need to modify it
- To add a new task, simply follow procedure on previous slides
- To edit a task click the pencil next to the name
  - Modify any items
    - ~ Start date
    - ~ Duration
    - ~ Owner



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## Project Plan Task Management



- As a task owner you will need to provide progress reports
- Daily email notifications are provided for the owner of tasks when they are
  - Upcoming (< week)
  - In progress
  - Tasks behind schedule
  - Progress report behind schedule



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# Project Plan Task Management



- To provide progress reports
  - Click link in email to go directly to report
  - Click tasks entry in project plan

task remaining	task done	not counted	milestone	0
Task	ID	Dur.		
All tasks 1		1d		
Collect financial data from this quarter	1	1d		
new task notification export import select all cut copy copy link paste delete mark read undo				

- Click link for progress field

summary	
Title	Collect financial data from this quarter
ID	1
Predecessors	
Duration	1 day(s)
Earliest start	21 Jun 06
Progress	0% done (0 day done, 1 day remaining)
Latest report	None
Status	<input type="checkbox"/> not started
Omit from summaries	no
Start	21 Jun 06
Finish	21 Jun 06
Category	Financial
Resource	Curtis Test
Notes	Examples located in our Division eRoom
Description	Collect monthly data for this quarter



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# Project Plan Task Management



- Enter status data
  - % done OR days done OR days left
  - Comment to reflect task status

Collect financial data from this quarter

Report Progress

Enter progress as of today. You can enter progress as a percentage of the task's duration, or as days done, or as days remaining.

New report														
Date	Status	% Done		Days done		Days left		Comment	Current duration	Current start	Current finish			
		actual	plan	actual	plan	actual	plan							
today	<div><div></div></div> 100% (0.1d) ahead	10	%	0%	0.1	d	0d	0.9	d	1d	started task	1	21 Jun 06	21 Jun

Progress reporting history

There are no progress reports for this task.

- Progress report history cannot be modified or removed
- Anyone with viewing rights to the project plan can view the progress reports




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## Resources for information



- <http://www.lbl.gov/ITSD/CIS/citg/eroom/>
  - eRoom overview
- <https://eroom2.lbl.gov/eRoomHelp/en/eRoom-7.htm#index.htm>
  - eRoom help page
  - Select  in top right corner of any eRoom page
- Custom eRoom training & consulting from lab eRoom expert.



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## Questions?



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